

A decorative archway with three columns and two spheres, rendered in black and white, set against a background of diagonal stripes in teal and red. The archway is supported by three columns, each topped with a sphere. The arch itself is ornate with scrollwork and small circles.

2024-2025

SCHOLARSHIP PLAYBOOK

A GUIDE TO SCHOLARSHIPS
AT THE UNIVERSITY OF GEORGIA



UNIVERSITY OF GEORGIA

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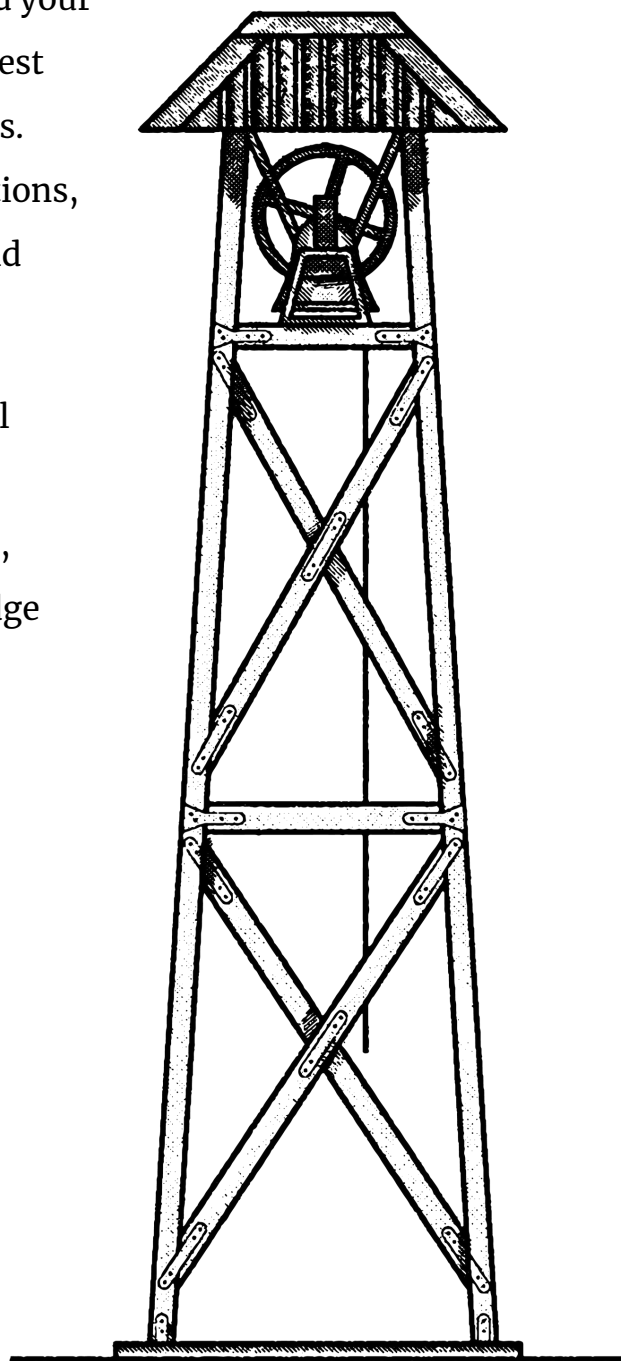
INTRODUCTION

BUILDING A FOUNDATION FOR BEST PRACTICES

The purpose of this playbook is to better equip you and your unit to facilitate scholarship administration, inform best practices and foster collaborative campus partnerships. Throughout the playbook, you will find helpful definitions, key resource guides, strategic timeline suggestions and privacy requirements.

This playbook is not exhaustive; you and your unit will likely need to tailor your scholarship awarding and stewardship processes to best fit your needs. However, this guide should help establish foundational knowledge for new employees, generate ideas for current employees, and support high-level scholarship administration and stewardship practices.

Stewardship changes lives. Unspent funds can mean a student goes unsupported. Lack of communication with donors about how their funds are used risks the loss of donor trust. We know why this work matters, and we hope this guide helps you facilitate it effectively. Thank you for all that you do to support the University of Georgia!



GLOSSARY

- **Assistantship** – A form of employment for a graduate student. The student is providing some service to the university, and compensation is provided monthly and processed through payroll. There is a work requirement.
- **Athena** – The UGA integrated student information system which enables secure web-based access to student information, including the student’s financial aid application status and award.
- **Award** – Scholarships, fellowships and awards are similar terms and can sometimes be used interchangeably. In general, “award” refers to one-time, non-renewable financial support given to a student based on achievement, academic performance or other criteria. The University of Georgia policy, in compliance with federal student aid regulations, requires that all scholarships, grants, awards, stipends, waivers and prize payments to students be made through the Office of Student Financial Aid. The only exception to this is if the fund is awarded as employment.
- **Award Year** – The UGA Award Year begins each fall semester and is comprised of that fall semester, the following spring semester and summer sessions.

- **Consent** – In order for OSFA to release a student’s financial award status or financial need, the student must complete the OSFA Scholarship Consent to Release Form. Disclosure of financial assistance for educational costs at the institution can only be released to a scholarship-granting organization or tribal organization with the student’s explicit written consent. Written consent is also required to release personally identifiable student information to a donor or non-scholarship administering university employee. The written consent component is required for need-based recipients and highly recommended for merit-based recipients.
- **Cost of Attendance (COA)** – Cost of Attendance (COA) parameters and components are determined by the Higher Education Act, Sec. 472. The COA is the cornerstone of establishing a student’s financial need, as it sets the limits on the total aid that a student may receive from Federal Student Aid (FSA) and all other need-based programs. The student’s COA is reflected on his or her UGA Financial Aid Award in Athena.
- **Direct PLUS Loan** – Direct PLUS Loans are federal loans that graduate or professional students and parents of dependent undergraduate students use to help pay for education expenses.
- **Direct Subsidized Loan** – A direct subsidized loan is a federal student loan for which a borrower does not need to pay the interest while in school, or in a grace or deferment period. These loans are based on the borrower’s financial need.
- **Direct Unsubsidized Loan** – A direct unsubsidized loan is a federal student loan which offers students a low fixed interest rate, flexible repayment terms and is not based on financial need. The borrower is responsible for paying all accumulated interest until the loan balance is paid off.

- **Endowed Fund** – Perpetual funds that are invested in the UGA Foundation’s long-term investment portfolio. Original gift value, or the principal amount, is kept intact while a portion of the investment income is used to provide spending.
- **Endowment Minimum** – The minimum amount of money required to establish an endowed fund. The minimum is set to ensure the fund can generate sufficient income to support its intended purpose. Endowments must meet their minimum balance requirement before becoming eligible to receive a spending calculation.
- **Enrollment Status** – A student’s enrollment status is based on the number of credit hours in which the student is enrolled at the end of each semester’s drop/add period. Financial Aid cannot disburse for a student’s period of non-enrollment.
- **Estimated Financial Need (EFN)** – Estimated Financial Need (EFN) is the difference between the student’s Cost of Attendance (COA) and his or her Student Aid Index (SAI).
- **Experiential Learning** – Experiential learning experiences are required for all undergraduates to graduate and are approved centrally and by schools and colleges to fulfill requirements. There are six categories of experiential learning: creative, global, internship, leadership, research and service. Experiential learning scholarships exist in the Office of Instruction and in schools/colleges/units.
- **Federal Pell Grant Program** – The Pell Grant is the largest federal grant program offered to undergraduates and is designed to assist students from low-income households. To qualify for a Pell Grant, a student must demonstrate financial need by completing and submitting the FAFSA form.

- **Federal Student Aid (FSA)** – Refers to the student aid programs authorized under Title IV of the Higher Education Act (as amended) that provide financial assistance to eligible students enrolled in postsecondary education. The FSA programs currently available to qualifying UGA students are:
 - The Federal Pell Grant Program
 - The Federal Supplemental Opportunity Grant (FSEOG) Program
 - The Federal Work-Study (FWS) Program
 - The William D. Ford Federal Direct Loan (FDL) Program:
 - The Federal Direct Subsidized Stafford Loan
 - The Federal Direct Unsubsidized Stafford Loan
 - The Federal Direct Parent PLUS Loan
 - The Federal Direct Graduate / Professional PLUS Loan

- **Fellowship** – Scholarships, fellowships and awards are very similar and can sometimes be used interchangeably. The term “fellowship” often refers to a graduate scholarship. In the case of the Graduate School’s fellowships, these are commonly stacked on top of a graduate student’s assistantship, increasing their payrate to accommodate the amount provided and are, therefore, processed through payroll. In this case, there is a work requirement.

- **Free Application for Federal Student Aid (FAFSA)** – To be considered for Federal Student Aid for a specific Award Year, students and parents of dependent students must complete the U.S. Department of Education’s FAFSA applicable to that Award Year. The FAFSA collects financial and other information used to calculate the Student Aid Index (SAI) and to determine much of a student’s basic eligibility through computer matches within the U.S. Department of Education and with other federal agencies. The FAFSA can also be used to apply for the HOPE and Zell Miller Scholarships, but it must be completed every Award Year. A student must have a complete FAFSA on file with OSFA in order for need-based scholarship eligibility to be determined.

- **Fund Agreement** – Describes the purpose of a gift and documents the mutual approval of the donor(s), the unit(s), the University of Georgia and the UGA Foundation. A fund agreement serves as a guide to ensure gifts are deposited correctly, spent appropriately and stewarded accordingly.
- **Grant** – Financial support based on academic achievement or other criteria that may or may not include financial need. A grant recipient is selected based on specific criteria, which is typically set by the federal or state governments of the institution. Generally, the proceeds of the grant are used to offset the cost of a student's education for an upcoming or current academic year for performance or criteria met during the previous academic year. *Example: The Office of Student Financial Aid selects a recipient based on financial criteria and/or grade level and cumulative grade point average and other criteria (i.e. Hope, Zell, Pell Grant). Credit for the grant is reflected on the student's account for direct costs including, tuition, fees, room and board or a reimbursement is made to the student via either a check prepared and mailed to the student or direct deposit if students other assistance has paid fees and room/board.*
- **Ineligible Non-Citizen** – Persons with non-immigrant visas (includes those with work visas, students, visitors and foreign government officials) are not eligible for Federal Student Aid (FSA), State of Georgia Financial Aid and other need-based aid administered by the UGA Office of Student Financial Aid (OSFA).
- **Loan** – Financial support which must be repaid, usually with interest.
- **Merit-Based Aid** – Financial aid awarded on the basis of specific accomplishments or talents rather than financial need.
- **Need-Based Aid** – Financial aid awarded on the basis of documented need. Need is determined through the Free Application for Federal Student Aid (FAFSA) process.

- **Non-Endowed Fund/In and Out** – Operates like a checking account, where the entire balance is available for expenditures. Funds are not invested and are held in cash.
- **Prizes and Drawings** – Recognition based on competition or other criteria. If a prize or drawing is open to only UGA students, the value of the prize must be reported to OSFA. If a prize or drawing is open to the public-at-large (students and non-students), it does not need to be reported to OSFA. *Example: A competition is held solely for students enrolled at UGA. Prizes for 1st, 2nd, and 3rd places are awarded. Per federal regulations, OSFA must include the prize value as part of a student's award package.*
- **Rural Scholar** – A student from a U.S. Census-designated rural place. Typically, in the state of Georgia, rurality is defined by counties with populations of less than 50,000.
- **Satisfactory Academic Progress** – Satisfactory academic progress is the process a school uses to determine if a student is meeting all his or her educational requirements and is on target to graduate on time with a degree or certificate. This process may vary across schools.

- **Scholarship** – Scholarships, fellowships and awards are very similar and can sometimes be used interchangeably. The term “scholarship” often refers to undergraduate scholarships but is generally applicable.

Most typically, “scholarship” refers to financial support based on academic achievement or other criteria that may or may not include financial need. The donor of the scholarship, in consultation with the academic department and the UGA Foundation, sets the criteria for recipient selection. Proceeds of the scholarship are applied to the recipient’s student account, offsetting the cost of the student’s education for an upcoming or current academic year. The student must be enrolled during the semester the scholarship is issued to receive any benefit. There can be no work requirement.

Most scholarships are managed through the UGA Foundation, but you may also see “UGA Bursar Scholarships,” which are managed through the University’s Bursar’s Office. Endowments housed in the Foundation are actively managed and invested by the Foundation. Funds housed at the University Bursar’s Office are not invested.

Example: Departments, schools or the Office of Student Financial Aid (OSFA) select recipients based on criteria of the scholarship agreement (e.g. major, grade level, grade point average, financial need, a combination of other restrictive criteria). Once the scholarship is processed, credit for the scholarship is reflected on the student’s account for direct costs, including tuition, fees, room and board. This directly offsets these costs or, if the student has other aid or has already paid these charges, a reimbursement/refund is made to the student via either a check prepared and mailed to the student or direct deposit.

- **Scholarship Universe** – Scholarship Universe is a state-of-the-art scholarship matching system that maximizes opportunities for UGA students and was developed to help students connect to as many relevant and legitimate scholarship opportunities as possible on one mobile friendly site. Scholarship Universe allows students to create an academic profile that enables them to be connected with various scholarship opportunities from external scholarship organizations. All scholarship funds distributed to students are required to be tracked through and facilitated through Scholarship Universe.
- **Selection Committee/Honorifics** – A group of institutional representatives who review applications and select awards based on scholarship criteria. Selection committees are not required.
- **Spending Allocation/Spending Side** – Rules and guidelines that determine how much of an endowment's return will be distributed for use in a given fiscal year. The goal is to balance the needs of the present with the needs of future generations, ensuring long-term financial stability. If an endowment meets the eligibility criteria and receives a spending allocation, those funds are available for use on the operational/spending side of the endowment. The corpus or principal amount remains intact, as only a portion of the investment income is used for the allocation.
- **Stewardship Recipient** – The constituent(s) who are set up to receive stewardship for the fund. The stewardship recipient can be the founding donor of the fund, a major donor to the fund, an executor/attorney, a foundation/board contact, fund honoree, family member and/or a development staff member. There can be multiple stewardship recipients per fund. The stewardship recipient information lives in GAIL on the fund's profile.

- **Stipend** – Payments from sponsored projects processed via Scholarship Universe or directly via the Bursar's Charge-to-Account process for both sponsored projects and other sources, in which case they are classified as "tuition" in UGA's financial system. To receive a stipend, the student is likely providing a service to the university, but the funds they receive are independent from the work they complete, as there may not be a work requirement to qualify for a stipend. If you are awarding funds from an external grant, it is typically best practice to work with sponsored projects.
- **Student Aid Index (SAI)** – An eligibility index that is used to determine how much federal student aid a student qualifies for.
- **Verification** – The U.S. Department of Education required process whereby the UGA Office of Student Financial Aid (OSFA) confirms that the information reported on a student's Free Application for Federal Student Aid (FAFSA) is accurate. A student's level of need cannot be determined while a student is in Verification.

SCHOLARSHIP AWARDING TIMELINE

FIRST YEAR STUDENTS

Awards are made prior to May 1 (Commitment Deadline).

RETURNING STUDENTS

Full Academic Year (Fall, Spring and Summer) Awards made at least two weeks prior to the [Payment Deadline](#).

SAMPLE TIMELINE

- **July:** Deadline to send scholarship offers to the Financial Aid Office and deadline for funding.
- **August:** Financial Aid applies the scholarship funds to the student's account for the upcoming year/fall semester.
- **October:** Review of scholarship application. Any new scholarships are added to the application.
- **November:** Scholarship application for the following academic year goes live. Notifications are sent to all students and reminders are sent to current scholarship students to re-apply.
- **December/January:** Reminders are sent to students to apply for scholarships.
- **February:** Scholarship Application Deadline/review of scholarship criteria with Honorifics Committee Chair/Selection Committees begin meeting.
- **March:** Development meets with Business Office to confirm spending allocations available from the UGA Foundation for all scholarships. Selection Committees make all final decisions by the end of March.
- **April:** Award scholarships for the upcoming fall and next spring semester and notify scholarship recipients. Scholarship offers should be accepted by the end of April.
- **May:** Follow-up reminders and/or new offers where applicable.

AWARDING

FINANCIAL ADMINISTRATION & BUDGET

Based on a fiscal year timeline:

EARLY MAY

- **Initial Update:** The UGA Foundation reaches out to the Office of Student Financial Aid and requests a current list of active funds in Scholarship Universe.
- **Foundation Allocation:** Based on the provided list, the Foundation provides spending allocations on the endowments for the upcoming fiscal year. This includes GCS endowments.
- **New Endowments:** During this period, the Foundation also adds any new scholarship endowments that are receiving their first spending allocation.
- **Open Academic Year in Scholarship Universe:** With collaboration of UGAF, OSFA opens the new academic year in Scholarship Universe for awards on endowment allocations.

JUNE 30

- **Close Academic Year in Scholarship Universe:** With collaboration of UGAF, OSFA closes down budgets for the current academic year in Scholarship Universe in preparation for the new academic year.
 - Awards for the prior year after this date will require a budget request form to be submitted to move budget from the new academic year to cover the prior year award.

EARLY JULY

- **Second Update:** UGAF provides an update to the initial budget load at the beginning of July.
- **Inclusions**
 - **Endowed, Non-Endowed and Unrestricted:** This update encompasses all fund types.
 - **Endowments:** For endowments, interim roll-forward cash balances as of July 1 are combined with spending allocations.
 - **Non-Endowed:** Interim roll-forward cash balances are budgeted.
 - **Unrestricted:** The approved, annual allocation is budgeted.
- **First Budget Update:** This serves as the first budget update for non-endowed and unrestricted funding.
- **Risk Consideration:** As these are interim cash balances, there is a risk of inflation due to ongoing activity from the prior fiscal year. This risk carries until the fiscal year is officially closed.

EARLY AUGUST

- **Third and Final Update:** At this point, a third and final budget update is processed.
- **Roll-Forward Cash Balances:** This update incorporates changes to the roll-forward cash balances that may have been influenced by additional expense activity during the prior year.
- **Final Budget Update:** Consider this as the concluding budget update to commence the new fiscal year.

UPDATING SCHOLARSHIP BUDGETS THROUGHOUT THE YEAR

1. Request Initiation

a. **Electronic Request:** A unit or department can initiate a budget update electronically via a TeamDynamix Ticket. This is done using the [Scholarship Budget Request Form](#).

b. Information Needed

- i. Fund name and number
- ii. Department name
- iii. Contact information
- iv. Business purpose
- v. Requested budget amount

2. Review Process

a. Upon receiving the completed form, the UGA Foundation consults the Scholarship Code Report in Scholarship Universe.

b. This review determines whether the fund and requested budget amount have already been provided to OSFA.

REVIEWING REQUEST

1. Fund and budget in Scholarship Universe:

Foundation Review: If it is determined that the fund and the requested budget amount have already been provided to OSFA, a response is sent back to the initiator of the TeamDynamix ticket.

Response: The response informs the initiator that the budget is available in Scholarship Universe. No further action is taken, and the ticket is closed.

REVIEWING REQUEST CONTINUED

2. No fund or budget in Scholarship Universe:

Foundation Review: The UGA Foundation staff evaluates criteria needed for establishing a budget. This includes spendable cash and a signed fund agreement.

- a. A signed agreement must be present before proceeding, as spending cannot occur without one.

No Signed Agreement: If there is not a signed agreement, a status update is requested by reaching out to the Fund Agreements team. A notification is sent to the initiator of the budget request ticket, informing them that a signed agreement is not available. The ticket remains open awaiting a response from the requestor.

Signed Agreement & Spendable Cash: If there is a signed agreement and spendable cash, the trust purpose of the fund is reviewed. The review ensures alignment with the business purpose provided in the ticket (e.g. awards, scholarships, emergency funding, etc.).

- a. **Trust and Business Alignment:** If trust and business purposes do not align, a message requesting additional information is sent back to the requestor.
- b. **Ticket Details Review:** the request is reviewed to confirm the fund number, fund name, department and unity were entered correctly.
 - i. The trust purpose from the fund agreement is added to the ticket. A determination of whether the fund is need-based is made and noted on the ticket.

OSFA Workflow & Approval: Once approved by the UGA Foundation, the ticket is then added to OSFA's workflow, and sent for their review. If no additional information is needed, OSFA will respond with approval.

REVIEWING REQUEST CONTINUED

3. Fund in Scholarship Universe, budget adjustment needed:

Foundation Review: First, confirm the total awarded amount stated in the Scholarship Code Report within Scholarship Universe has been posted to FAME. Additionally, the UGA Foundation verifies that there is spendable cash available.

- a. **Ticket Workflow:** If both conditions are met, the ticket is approved by the Foundation and forwarded to OSFA workflow for their approval.

APPLICATION & SELECTION

Application and selection processes will vary based on the school/college/unit. Two sample processes are provided below.

SAMPLE ONE

- Use one standardized application for all undergraduate scholarships and one application for all graduate scholarships (also known as fellowships).
- Use logic within the application to filter out applicants according to scholarship selection criteria. Applications cannot include questions related to race, color, religion, nationality, national origin, age, disability, sex or sexual orientation.
- Set an application deadline that will allow you to follow the awarding schedule of the Office of Student Financial Aid as closely as possible. Opening the application on November 1st and closing the application on February 28th will allow ample time for applications to be submitted and for selections to be made before students leave for the summer. In addition, it is early enough so that prospective students can take their financial aid package into account when making their college attendance decisions.
- Use one selection committee to choose all scholarships if possible. This ensures that all scholarships are on the same timeline throughout the year and the selection process is consistent throughout the unit.
- Schedule a meeting between your unit's Donor Relations contact and the Honorifics/Selection committee before the selection process begins to ensure that they are clear on what scholarships are being selected for and awarded and clarify any questions on donor intent or scholarship specifics.
- Your unit's Donor Relations office should partner with the Honorifics/Selection committee to ensure that donor intent is followed when making scholarship selections. If the scholarship is too specific, and a candidate that meets all criteria is not available, Donor Relations should work with the donor to ensure that a candidate is chosen that meets the criteria as closely as possible.

SAMPLE TWO

- Determine selection criteria for fund(s) from fund agreements and ensure questions are included on application to address each criterion. Applications cannot include questions related to race, color, religion, nationality, national origin, age, disability, sex or sexual orientation.
- Determine criteria for selection committees from fund agreements.
- Ensure timelines for application and selection align with OSFA timelines and admissions deadlines in your school/college.
- Promote scholarship opportunities within your school/college/unit (student listservs, faculty meetings, Graduate School, social media, school/college website, etc.).
- After applications close, determine eligibility status of each student.
 - Financial need status can be determined by sending a list of student 810s to osfa5@uga.edu via SendFiles. Specify if you want them to qualify the need (Yes – Most Need, Yes, Yes – Least Need, No Need, No FAFSA).
- Meet with appropriate committee to review eligible applicants.
- Make selections.
- Notify students who were selected.
 - Students should be asked to review terms of the scholarship and accept.
 - If for any reason the student does not participate in the program/activity for which the funding is being provided, they are required to return the funds to the school/college.
 - Accepting a scholarship could reduce funds awarded from other sources. The scholarship administrator in your unit is responsible for contacting the Office of Student Financial Aid to understand how these funds could impact your students' account and other financial aid.
- Upon acceptance, enter scholarship award in Scholarship Universe.
- Notify students who were not selected.
 - Where possible, refer students to other funding sources.

FUND AGREEMENT GUIDELINES

Fund agreements remain the linchpin of fund administration. A well-thought-out fund agreement is essential for stewardship, fundraising, and administering gifts made to the UGA Foundation. Doing a fund agreement correctly on the front end creates lower administrative burdens, sets clear expectations for the donor, and enables a fund to serve its purpose in perpetuity. UGAF has listed on its website the process for setting up a new fund agreement or making addendums to the fund. Included in this guide are some other helpful resources for executing similar processes.

In terms of best practices, a stewardship professional, in consultation with their business office and development team, should carefully monitor that funds attached to their foundation accounts are being spent appropriately and for the purpose that the fund agreement was created for. In the creation of the fund agreement, development officers should do their best to communicate with donors about the time it takes to create a fund agreement and the process by which a draft will be shared with them prior to final signature stage. This is also a crucial time for development officers to review donor preferences or stewardship expectations with their leadership. Generally, the broader a fund agreement, the easier it will be to administer both now and in the future.

If a donor is determined to support a student from a remote county in Georgia, for example, the development officer or stewardship professional should discuss the need for a secondary, broader preference to ensure the fund can be awarded. These discussions, along with reviewing the draft agreement, are crucial to maintaining workflow. Fund adjustments should be completed before submitting approval to the UGAF team to generate a fund agreement in the DocuSign queue.

For best practices in fund administration, refer to the detailed fund agreement in the Fund Profile Report in FAME. Review your funds in the fall semester. If an endowment hasn't been awarded, you can still make an award for the spring semester. Conduct another review at the end of the fiscal year. If a historical agreement becomes difficult to award, work on an addendum with a donor representative. These funds are meant to serve the institution's needs and be spent accordingly.

OVERVIEW AND RESOURCES

A fund agreement is created to document gift intent when the donor wishes to restrict the gift, and a current fund does not exist for this purpose. Gifts that cannot be deposited into an existing fund of the University of Georgia Foundation are generally used to establish a new fund if certain requirements are met. The fundraisers, or development officers, at the University of Georgia will determine this through their work with the donor(s) and/or donor representative(s) at the time the gift is made. The UGA Foundation accounting team acts as the facilitator in this process to answer questions and prepare the fund agreements for approval.

The development officers work with the donor(s) and/or donor representative(s) to prepare a fund at the time the gift(s) is made. The UGA Foundation acts as facilitator in this process to answer questions and prepare the fund agreements for approval.

Clauses for proposals, gift agreements or solicitations that discriminate in favor of or against race, color, religion, nationality, national origin, age, disability, sex or sexual orientation are prohibited as mandated by federal and state laws and regulations as well as UGA policy.

PROCEDURE

- The development officer should work with the donor(s) or donor representative(s) to develop a purpose statement and criteria. The amount and purpose of the gift will determine the type of agreement to use (see [Endowment Requirements](#)). The UGAF Gift Agreements team is available to assist with this determination.

- The development officer should fill out the [New Fund and Addendum Request](#) form to start the process for a new fund setup and draft agreement.
- The UGAF Gift Agreements team will prepare a draft and share it with the development officer using the TeamDynamix ticketing system. The development officer is responsible for sharing the draft with the donor(s)/donor representative(s) and relevant members of the benefiting unit.
- The development officer should respond to the TeamDynamix ticket with any questions, concerns or edits related to the draft agreement. The UGAF Gift Agreements team will review the requested edits and provide a revised draft agreement. If no edits are requested, and the agreement is ready for signature, then the development officer should respond to the ticket with approval to move forward with signatures using the automated DocuSign signature process.
- The final version of the fund agreement will be loaded into DocuSign. DocuSign has two stages: (1) official approval from all UGA internal signers and (2) signatures from the donor(s)/rep(s) and all UGA internal signers. The DocuSign process will begin with the development officer giving official approval for the final version of the agreement. Next, the agreement goes to all UGA internal parties for review/approval. Once all UGA internal signers have reviewed/approved, the agreement will go back to the development officer again before going to the donor(s)/rep(s) for signature. At this point, the development officer will have an opportunity to reach out to the donor(s)/rep(s) to let them know the DocuSign email is forthcoming. This will keep the donor(s)/rep(s) informed just in case the DocuSign email goes into the donor(s)/rep(s) junk/spam email folder.
- Once all signatures are obtained on the fund agreement, DocuSign will automatically email a PDF copy of the finalized agreement to all parties involved in the DocuSign process, including the donor(s)/rep(s). The finalized agreement will be uploaded to the fund in the Financial Accounting System and will also be viewable in the Fundraising System.

FUND AGREEMENT CRITERIA

ENDOWED FUNDS

- An endowed gift is one in which the original principal is never invaded, and the gift exists in perpetuity. Endowments are generally funded within five years (or less) of the initial contribution. Income is distributed annually pursuant to policies adopted by the University of Georgia Foundation.
- The type of endowment determines the type of fund agreement required. Please see [Endowment Requirements](#) for the various kinds of endowed funds and the minimum funding required to establish each one. There are generally four endowed fund agreement formats. They are:
 - Endowed – This agreement is used when the initial gift(s) is sufficient to meet the endowment requirement.
 - Time-Period Specification – This agreement is used when the gift(s) will be received over a period of time (up to five years). The time period is indicated in the fund agreement, and expenditures from it are prohibited until the minimum funding is reached.
 - Chairs/Professorships – Chairs and professorships are generally created as endowments. Language in the fund agreement satisfies University of Georgia and Board of Regent requirements for hiring professors to a named chair or professorship position.
 - Declaration of Trust – This agreement is used when a gift(s) is received through a deferred mechanism: The donor(s) is deceased, and the gift(s) has been received through a deferred gift or from an estate. A finalized planned gift agreement or will is usually the source for drafting this type of agreement (although a declaration of trust may also be a non-endowed agreement).

NON-ENDOWED FUNDS

- A non-endowed gift agreement ensures the gift(s) will be spent to support the fund purpose. There are two types of formats for non-endowed fund agreements:
 - Non-Endowed – A non-endowed fund generates no investment earnings and is not assessed a fee.
 - Declaration of Trust – This agreement is used when a gift(s) is received through a deferred mechanism. The donor(s) is deceased, and the gift(s) has been received through a deferred gift or from an estate. This fund follows the same criteria as the endowed declaration of trust, except that the donor's intent is for the entire gift to be expended for the intended purpose indicated by a deferred gift arrangement, a finalized planned gift agreement, a will or any other document which transfers the estate gift to the Foundation.

ADDENDUMS

- Addendums are used to make minor modifications to original fund agreements. Changes to original fund agreements are not encouraged and should be decided on a case-by-case basis.
- In some cases, to be determined by the UGAF Gift Agreements team, a full replacement agreement may be more appropriate than an addendum.
- Addendums may be requested using the [New Fund and Addendum Request](#) form.
- Changes to the benefiting department name through department mergers or university renaming will be handled by the UGA Foundation office and do not require an addendum, except in certain rare instances.

FUND MAINTENANCE

- The UGA Foundation periodically reviews unsigned, expired, and inactive funds and may contact the benefiting unit to discuss possible options for next steps. This ensures donations are utilized to support UGA's mission. The terms of each fund agreement are followed in all cases, and highest priority is placed on honoring the intent of the donor(s)/rep(s).
- Unsigned fund agreements are reported quarterly to ensure progress through the approval stages. The UGAF Gift Agreements team will contact the appropriate development officer to determine the status and the necessary steps to finalize the agreement.
- Endowments not fully funded during the time period described in the agreement are reported annually. The UGAF Gift Agreements team will contact the appropriate development officer for information. The development officer will work with the head of the unit to choose an appropriate path forward. The unit may choose to (1) provide a plan to raise additional gifts, (2) transfer the balance needed from one of the unit's general funds, or (3) close the fund and transfer the balance to the unit's general fund. If a fund closure is requested, the fund agreement will be used to guide the process.
- Funds with no activity for twelve consecutive months are reported annually. The UGAF Gift Agreements team will contact the appropriate development officer for information. The development officer will work with the head of the unit to choose an appropriate path forward. The unit may request (1) the fund remain open for future needs or (2) the fund be closed, and the balance transferred to the unit's general fund. If a fund closure is requested, the fund agreement will be used to guide the process.

ADDITIONAL RESOURCES

[UGA Foundation Resources](#)

[Endowment Minimums for Faculty/Staff Enhancement](#)

[Endowment Minimums for Student Support](#)

[New Fund Request](#)

[All Other Foundation Service Requests](#)

BEST PRACTICES

Please see some suggested scholarship selection criteria terms and definitions below:

- **Low Income** – Typically indicated by FAFSA information and student has demonstrated limited capacity available in family financial support.
- **First-Generation Student** – Being a first-generation student means that your parent(s) did not complete a 4-year college or university degree, regardless of other family members' level of education.
- **Raised in a Single Parent Household** – Eligible students will have lived with only one parent during at least one year of their high school career. Students whose parents were never married or who divorced but live under the same roof do not qualify.

- **Overcome Unique Challenges** – Students who indicate they qualify under this criterion should be asked to provide a written justification. Scholarship committee members will evaluate the students' written statements on a case-by-case basis. Examples of unique challenges could include being raised in a single-parent household, a widowed household, an immigrant family, a family who has experienced medical or financial hardship, social/cultural hardship, etc.

STEWARDSHIP

SCHOLARSHIP GRATITUDE REPORTS

Scholarship Gratitude Reports are mailed to scholarship donors twice a year: once in the fall and once in the spring.

FALL GRATITUDE REPORTS

All scholarship recipients of participating schools and colleges are contacted at the beginning of the fall semester and asked to complete a survey that captures their name, hometown, and education information. They can write a message of gratitude to their donor and provide an update on their experience as a student at UGA. Starting in FY25, these reports will be packaged digitally and sent to donors with their endowment report. For non-endowed scholarships, the fall gratitude reports will be mailed to stewardship recipients.

SPRING GRATITUDE REPORTS

New scholarship recipients and scholarship recipients who did not respond to the Fall Gratitude Report request are contacted at the beginning of the spring semester and asked to complete the same survey. The message of thanks received from the student is packaged nicely and mailed to their scholarship recipient at the end of the spring semester.

SCHOLARSHIP GRATITUDE REPORTS CONTINUED

- These gratitude reports are very meaningful to scholarship donors and give them a glimpse into the incredible impact they are making at UGA.
- Out of the two reporting times, the fall mailing is our larger recipient list. The spring mailing tends to catch new recipients and clean up those who did not respond in the fall.
- Students are highly encouraged to participate but cannot be required to participate.
- The Office of Donor Relations and Stewardship offers an incentive to students who participate in completing a gratitude report.



Sample Scholarship Gratitude Report from 2023-2024

SCHOLARSHIP LUNCHEONS

- A luncheon/event where scholarship donors and recipients come together to meet each other and make connections.
- Scholarship events like these typically occur once a year.
 - A sample list of schools and colleges currently facilitating scholarship events:
 - College of Engineering
 - Morehead Honors College
 - School of Social Work
 - School of Law
 - Hugh Hodgson School of Music
 - Student Affairs
 - Warnell School of Forestry and Natural Resources
- An example of the planning process at the College of Engineering is outlined below:
 - Engineering holds their scholarship luncheon in the fall (typically late October/early November)
 - Engineering does two waves of save-the-dates. Their initial save-the-date goes out in July as part of their scholarship introductory cards sent to donors. These cards give the donors basic information about their scholarship recipients: name, hometown, year and major. The official save-the-date email goes out to all groups in August. The invitation list includes all scholarship recipients, donors, Office of Student Success and Achievement, Development team members, Dean, Assistant Deans and school chairs.
 - Invitations and an RSVP link are emailed to all invitees about 6-8 weeks before the event. Digital is prioritized over physical for these invitations to avoid mail delays, simplify the RSVP process, and eliminate printing and postage costs.

- Students are informed about the event at the beginning of the semester by a donor relations staff member, who sends out an introductory email detailing the stewardship activities that the students will be asked to take part in during the year. Students are asked to come into the office and write a thank you note, at which time staff members talk to the students to get to know them and tell them a bit about their donor, if possible.
- RSVP follow up:
 - As the RSVP deadline nears, students and donors who have not registered are reached out to. If a donor is registered and their scholarship recipient is not yet confirmed, the student will be contacted and encouraged to attend if possible. If the student is unable to attend, the Donor Relations and Stewardship staff will notify the donor ahead of time.
 - If a student is unable to attend due to a class conflict, we offer to write a note to the professor explaining more about the event. Professors are usually very understanding and encourage the student to attend.
- Once the RSVP list is complete, seating charts are drafted. For those who don't have a donor or student in attendance, donors and students are strategically placed at tables with other individuals they can interact with and still enjoy their experience. In cases where the donors and students are unable to meet at the luncheon, a virtual meeting can be coordinated, or an arrangement can be made for the student and donor to meet on campus later.

- Logistics for the luncheon:
 - Catered buffet
 - Tables of 8
 - Pre-Reception begins at 11:30 a.m. (gives attendees a chance to get their nametag, pair up with their student/donor, take pictures, meet and greet, etc.)
 - A professional photographer is on hand to take group pictures of students with their donors. These pictures are printed on site and placed in branded College of Engineering photo folders for attendees to take with them after the luncheon.
 - Luncheon begins at 12 p.m.
 - An Engineering staff member is placed at every table to help facilitate discussions if needed and serves as a flexible seat in case there are walk-ins to the event.
 - Development officers are seated with the donors they are most familiar with.
 - The program includes a student speaker and a donor speaker. The Dean will also say a few words at the end. Both donors and students are recognized in the Dean's remarks as this event serves as donor recognition/stewardship and a celebration of scholarship students' achievements.
 - Future programs may take the form of panel discussions to make the experience more interactive. Participants may include the Dean, two donors and two scholarship recipients to provide a variety of perspectives.
 - Luncheon ends promptly at 1 p.m.

If you have questions about this event, please contact Kim Brown in the College of Engineering at kimberly.brown2@uga.edu

TIPS FOR COLLECTING THANK YOU NOTES

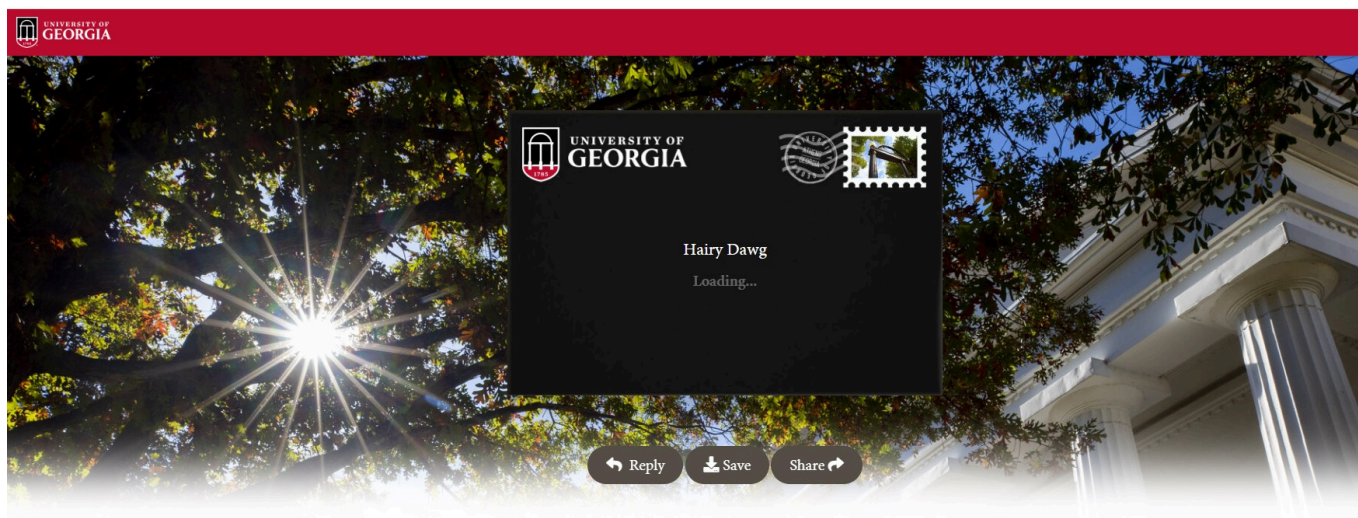
- Contact your scholarship recipients at the start of the semester. Use this opportunity to introduce yourself and explain to students more about the various stewardship activities they will be asked to participate in throughout the year (thank you notes, donor events/meetings, videos, etc.) and why they are important. Outline the stewardship timeline so students can anticipate when they will be reached out to.
- For students with multiple scholarships, encourage them to write a thank you note for each one they are receiving. Explain the importance of these thank you notes, i.e., showing gratitude, demonstrating impact, laying the groundwork for future gifts to support scholarships.
- Provide a clear time frame and a specific deadline. Send multiple reminders for students to write their notes as necessary.
- Provide a place/workstation in your office that gives students all the tools they need to write their note. Make it as easy as possible on them. If students are not able to come to the office, implement an easy and accessible alternative.

ITEMS TO PROVIDE FOR THANK YOU NOTES

- Clear instructions
- Blank, branded note cards
- Pens
- Suggested wording
- Donor salutation for each scholarship
- The name of the scholarship that the student is receiving (many times they don't remember)
- A place to put their notes when they are finished
- Consent form for them to fill out, granting permission to share information through thank you notes
- Another option is to organize a thank you note event, where students come to a central location during a specific timeframe to write their notes. Offer free food as an incentive for them to attend!

THANKVIEW VIDEOS

- ThankView videos are a great way to steward scholarship donors. Donors love to hear from their students, and receiving a touch point in which they can see and hear their scholarship recipient is optimal.
- ThankView videos can be used any time of year for initial introduction or as follow up to an event/meeting. Great topics for students to cover in a video are:
 - If post-event, “great meeting/seeing you”
 - Information about the classes they are taking/favorite class/challenging class, etc.
 - If sending in spring, videos are great to use for updates on how the year is going.
 - For graduating seniors, ThankView is a great medium to let the donor know they are graduating and to thank them for the collective impact that the scholarship has had on their education. This type of message is especially gratifying for donors.
- Provide students with a suggested script, tips and guidelines for making quality videos, and a dress code. Suggest that they record their videos in a place on campus that is recognizable. Advise against videos recorded in an apartment or in front of a messy/busy background.
- Help students if needed.
- Give students 2-3 weeks to complete their videos and send at least two reminders.



CONSENT FORMS

- You are not permitted to require a student to complete stewardship practices to receive their scholarship. This applies to both need-based recipients and merit-based recipients.
- What's allowed?
 - Need-based: To share identifiable information, collect a thank you note, meet a donor, etc., you must collect a signed consent form.
 - Merit-based: You do not need a signed consent form to share identifiable information about the student with the donor.
 - Although you cannot require the student to complete stewardship activities to receive their scholarship, you can ask merit recipients to write a letter, attend an event, etc. without receiving signed consent. Their verbal consent works fine.
- Template consent forms for need-based scholarships:
 - Thank you note/ThankView Consent Form (Simple Version): [PDF Form](#)
 - Thank you note Consent Form (Advanced Version): [PDF Form](#)
 - Event/Donor Visit Consent Form: [PDF Form](#)
 - Marketing and Communication Consent Form: [PDF Form](#)

Digital formats are available for each consent form. Please reach out to Caitlin Lacey (cslacey@uga.edu) for more information.

STUDENT/DONOR MEETINGS

- Student/donor meetings are a great opportunity for the student to thank their donor and share how their scholarship has helped them be successful at UGA. These interactions are meaningful to both the student and the scholarship donor.
- Meetings can be in-person or virtual.
- If a donor supports multiple scholarship recipients, they can meet with their students individually or in a group setting, based on what the donor prefers and has the time for.
- If the meeting is with a need-based scholarship recipient, you must have the student sign a consent form before meeting with their donor.
- The day before the meeting takes place, be sure to send the student a reminder email and communicate any details, including:
 - Location, date, time and parking information.
 - Cost of their meal will be covered if asked to attend a lunch, dinner or coffee meeting.
 - Dress code for the meeting.
 - Phone number of staff member leading the meeting, in case there are last minute changes or questions.
 - List of members who will be present at the meeting.
 - Overview of what they can expect during the meeting.
- Please ensure a UGA development staff member is present during the meeting to help guide the conversation and make sure the student/donor is not asked something inappropriate or uncomfortable. For any meeting with a GCS recipient, please include either Graff Wilson or Caitlin Lacey in the meeting.
- Light snacks/water bottles are great to include during these meetings.
- If the donor will be meeting students in a group setting, provide name tags or name cards for the students. A briefing for the donor beforehand that includes details of the meeting location, date, time, parking information, the names of the students who will be in attendance along with their education information, hometown, and expected graduation is very helpful for the donor.

BEST PRACTICES

- If possible, meet your scholarship students at the beginning of the semester, either via email or preferably in person. This builds trust, rapport, and gives them a contact they feel comfortable reaching out to.
- When inviting students to events, use in-person and electronic forms of communication to make sure they have received the messaging.
- To ensure proper addressing and mailing, have the students turn in their thank you notes, and the Donor Relations staff can address and mail.
- Provide students with suggested wording but also encourage them to include a thank you, life updates, and overall impact of their UGA experience.
- The most success in student thank you note writing is seen when students are informed about the importance of the process and the impact it has on the donors.

KEY CONTACTS

Office of Instruction

**For general scholarship questions and Georgia Commitment Scholarships*

- Graff Wilson: james.wilson2@uga.edu

Office of Financial Aid

**For assessing student need eligibility and any awarding questions*

- Lori Whitaker: loriwhit@uga.edu
- Shelby Jarrett: sjarrett@uga.edu

Donor Relations and Stewardship

**For scholarship gratitude reports and Georgia Commitment Ambassadors*

- Caitlin Lacey: cslacey@uga.edu
- Catherine Henry: cbhenry@uga.edu

UGA Foundation

**For fund balance/spendable, fund agreement, and legal questions*

- Will Hearn: whearn@uga.edu
- Jennifer Hancock: jgary@uga.edu
- Jackson O'Brien: jackson.obrien@uga.edu

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